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PATENT

IN THE UNITED STATES PATENT AND TRADEMARK OFFICE

In re the application of:

David MALONE et al

Serial No.: 09/832901 Group Art Unit: 2161

Filed: April 12, 2001

For: MESSAGING SYSTEM

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CLAIM OF PRIORITY
UNDER 35 U.S.C. § 119

Honorable Commissioner of
Patents and Trademarks
Washington, D.C. 20231

Sir:

The benefit of the filing date of prior foreign application No. 00650033.4 filed in Europe on April 13, 2000, is hereby requested and the right of priority provided in 35 U.S.C. §119 is hereby claimed.

In support of this claim, filed herewith is a certified copy of said original foreign application.

Respectfully submitted,

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Date: October 24, 2001

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Bescheinigung | Certificate | Attestation

Die angehefteten Unterlagen stimmen mit der ursprünglich eingereichten Fassung der auf dem nächsten Blatt bezeichneten europäischen Patentanmeldung überein.

The attached documents are exact copies of the European patent application described on the following page, as originally filed.

Les documents fixés à cette attestation sont conformes à la version initialement déposée de la demande de brevet européen spécifiée à la page suivante.

Patentanmeldung Nr. | Patent application No. | Demande de brevet n°

00650033.4

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Der Präsident des Europäischen Patentamts;
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Europäisches Patentamt
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Office eur péen des brevets

Blatt 2 der Bescheinigung
Sheet 2 of the certificate
Page 2 de l'attestation

Anmeldung Nr.:
Application no.:
Demande n°: 00650033.4

Anmeldetag:
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Anmelder:
Applicant(s):
Demandeur(s):
Twelve Horses Technology Limited
Dublin 2
IRELAND

Bezeichnung der Erfindung:
Title of the invention:
Titre de l'invention:
A messaging system

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"A Messaging System"

The invention relates to a messaging system for applications such as personalised collateral deployment in both hard and soft copy, customer response, direct marketing, lead generation, customer touch strategy and online collaboration.

In general, it is very time consuming for sales or marketing personnel to visit targeted contacts to obtain sales of various goods or services. This has over the years led to development of various collateral deployment, direct marketing and customer touch techniques. The traditional technique is to post a brochure to a targeted contact, the contact data being maintained in a database. While this approach is much less expensive than physically visiting a targeted contact, it is not particularly effective because it is time consuming for the contact to reply and because of the passive and general nature of the advertisement.

A further development of this technique has been to use email to transmit advertisements to targeted contacts. This has the advantage that it is a more active medium and it is easier for the contact to respond.

The present invention is directed towards providing a messaging system that uses an electronic network such as the Internet to direct messages in an effective and targeted manner to a recipient and enable the recipient to easily respond to the sender.

According to the invention, there is provided a messaging system comprising:-

build means for automatically building messages, each of which has profiled content customised for a recipient contact:

mail means for transmitting the messages to the contacts; and

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response management means for managing responses from contacts.

In one embodiment, the system comprises a client manager for maintaining a database of valid system clients, and a contacts database of contacts grouped according to client.

In another embodiment, the system comprises a contacts manager for maintaining the contacts database and for allowing valid clients to update their associated group of contacts.

In one embodiment, the system comprises a content manager for maintaining a content database of content elements associated with contacts, and for delivering the profiled content to the build means.

In another embodiment, client manager comprises means for maintaining a database of client-specific content such as logos or branding graphics.

In one embodiment, the build means comprises means for building a message comprising a portion transmitted to a contact and a portion maintained on the system, and the transmitted portion includes links to the hosted portion.

In one embodiment, said links are HTML links.

In another embodiment, the response management means comprises means for managing interactive retrieval of message content by the contacts via said links.

In one embodiment, the system comprises a response monitoring means comprising means for monitoring the number and nature of responses.

In one embodiment, the response monitoring means comprises means for monitoring:-

the number of messages not responded to,

the number of messages responded to, but for which the message content was not retrieved, and

the number of messages responded to and for which the message content was used.

In another embodiment, the response monitoring means comprises means for monitoring responses on a per-client basis.

In a further embodiment, the build means comprises means for building a message comprising a html link to a collaboration space where the recipient and the sender can both exchange files, assign tasks and view all previous messaging history.

In one embodiment, the build means comprises means for building and sending bulk personalised eMessages to a database of recipients and tracking and reporting on the results.

In one embodiment, the build means comprises means for integration with and reporting on lead generation programs to generate qualified sales leads.

The invention will be more clearly understood from the following description of some embodiments thereof, given by way of example only with reference to the accompanying drawings in which:-

Fig. 1 is a schematic representation of a messaging system of the invention; and

Figs. 2 and 3 are together a flow diagram illustrating operation of the system.

Referring to the drawings, and initially to Fig. 1 there is shown a messaging system 1 of the invention. The system 1 comprises various databases and executables residing on a server having communication stacks for Internet communication. In this embodiment, the system 1 is configured for direct marketing applications however, it may alternatively be configured for any other application which would benefit from messaging in a highly targeted and personalised manner, and which assists and encourages recipients to reply. Such other applications include polling of customers to gather information about their requirements, or distribution of software upgrades.

A client (or user) manager 2 manages a database 3 of clients and related data. Clients use the system for delivering messages and responses from targeted contacts are managed and monitored.

A content manager 5 provides access to content databases 6 whereby profiled content may be retrieved. A contacts manager 10 provides access to contacts databases 11. A database 15 provides viral links for use in advertisements. The system 1 also comprises a build engine 20, a messaging engine 25, a response management module 30, and a response monitoring module 35.

Operation of the system is now summarised with reference to Figs. 2 and 3, which illustrate a direct marketing method 40 in flow chart format. In step 41, a user (client) accesses the server 1 via the contacts manager 10. This module applies very strict user access control features on the basis of both password and username criteria retrieved from the client database 3 via the client manager 2.

The user may chose to update the contacts which is associated with him or her, as indicated by the decision step 42. If so, in step 43 the user uploads a contact dataset.

The dataset is used to update the relevant contact database 11 in a manner which is synchronised with the existing data.

To begin a messaging session, the user chooses targeted contacts in step 44 by selecting particular contacts from the contacts database 11. The contacts manager 10 ensures that there is access only to his/her contact database.

The build engine 20 then automatically retrieves profiled content via the content manager 5. The content manager 5 provides links to message segments which are profiled according to contacts. Thus, for example, a technical buyer in an airline company would receive a marketing message with airline text which is technically flavoured. In step 46, the build engine 20 retrieves client-specific custom content from the database 3. The custom content may, for example, include a signature, a photograph, logos, custom cover letters or any other content specific to the client. This is inserted automatically by the build engine 20.

In step 47, the build engine 20 builds a marketing message using the retrieved profiled content and the custom content. Viral links are retrieved from the database 15. This is essentially a link to a Web site which acts as a sales lead generator. Each message is uniquely created for the targeted contact in a preformatted HTML carrier which can accept hot links, text, and images. The carrier includes a number of links which direct a targeted contact to a view of a printable document. "Teaser text" messages are automatically displayed when the contact scrolls over the links. This allows a greater level of customer engagement. The generated message is then exported to a delivery file and is transmitted by the messaging engine 25 in step 48. An important aspect of operation of the build engine is that the message incorporates a printable pdf file. Indeed, it is not essential that the message be transmitted by email. It may, in addition or alternatively, be printed and delivered by a postal or courier service, depending on circumstances.

Over time, the targeted contacts will respond to a greater or lesser extent. Responding simply involves the contact clicking on a personalised URL and this provides direct access to the full message on the system 1. The contact does not receive the full message, but simply a hypertext link to the message in a short email message. Once the full message is opened by the contact, he or she may scroll through it and select printable matter with the prompting of the "teaser text". The response operations are controlled by the response management module 30 in step 49. Meanwhile, the response monitoring module 35 monitors the responses in step 50 and logs each response as falling into a category as follows:-

Red: the advertisement was not read and there was no response.

Green: the advertisement was read and the targeted contact responded to it.

Amber: the advertisement was read but was not responded to.

An administrator or the client may generate a response report off-line at any stage, as indicated by the step 51.

The messaging system that helps organisations promote products and services over an electronic network such as the Internet. The setup and operation of the invention is carried out by support organisations. The following describes operation of the system in more detail.

Client and User setup

A Client account is set up on the system, by the support organisation or by the system provider. Client Users are then associated to that account. The following describes the client set up process:

New Clients are created in the Client Manager

The Client Manager contains the following information:

Name

Primary Contact

The Client Manager also contains links to:

Client Usage Summary

Client User Management

Catalog Manager

Account Profile window

Client are created using the following process:

Open Client Account Profile window

Fill in the Primary Contact details in the 'Client Account Profile' window

Assign client status

Click create

Client Usage of the invention is tracked in the Usage Summary screen. This window outlines:

Status - Quantity and Size of all Messages

Usage - Number of Messages, Recipients and Responses

Client Users (end users of the invention) are associated to a client account and managed in the Client User manager.

In the Client User Manager client users are listed by:

Name

Role

Status

Activity

Client Users are created using the following process:

Open User Profile window

Fill in user details

Assign User name and Password

Select Time zone, Status and Role from the drop down menu's

Click create

Client Users details are changed using the following process:

Open User Profile window

Edit details as required

Click save

Client Users are made inactive using the following process:

Open User Profile window

Select 'inactive' from the 'status' drop down menu

Click save

The Virtual Literature Rack™

The Virtual Literature Rack is a collection of literature items or media assets. Each item in the VLR is known as a part. Each part belongs to a category. The VLR contains application, video, audio, PDF (Portable Document Format) and other media elements.

The content for a client is referred to as a catalog this catalog is stored in the Virtual Literature Rack (VLR). Clients have multiple catalog items, but each catalog item (called a part) is associated with a single client. The VLR has three components:

Parts

Sales Kits

Search Keys

New Parts are created using the following process

Open Part Profile window

Type the Part Number and Title in the Part Profile window

Select the attributes from the drop-down menus

Click the hand pointer in the bottom right hand corner to proceed to the next step

Locate the file that contains the required part

A 'Confirmation' window opens up - confirming that the part has been added to the catalog

Deselect the 'Update part status to available' checkbox to keep the status of the part to new (if required)

Click 'close' to close the 'Confirmation' window

Parts are edited using the following process:

Open the Part Profile Window

Click the 'Profile' tab to edit a part Title, Status or Search Key value

Edit Part details as required

Click 'Update' to save changes

Existing Parts are overwritten using the following process:

Upload a new file and overwrite the existing part

Locate the file that contains the required part

Click Update to save changes

Parts are deleted using the following process:

Click on the part number you want to delete
Click delete

Search Keys

Parts are given attributes to classify them (for example, Language, Year, Department etc.) Each attribute can have several values:

Department - sales, marketing, accounting etc
Year - 1999, 2000, 2001 etc
Language - French, Spanish, Swedish etc

Attributes can then be used as search keys. The search keys may not be relevant to every part in the VLR. The search keys can be added to and updated as required.

Access the search key section in the catalog manager:
Click 'Search Key' Tab in the 'Catalog Manager' screen
View Search Key Values
Click on the search key - link to view the search values
Create a New Search Key using the following process:
Type the New Search Key name (for example, Department or Year) in the text box
Add Search key
Click the new 'search key' link
Enter a value for the new search key in the text box in the 'Value for *New Search Key*' window
Add Search Key value

Remove a Search Key using the following process:

Select the checkbox for the Search Key you want to remove

Click 'remove'

Remove a Search Key Value using the following process:

Click the search key - link to view the search values

Select the check box for the value you want to delete

Click 'delete'

Sales Kits

Sales Kits are catalog parts that are grouped together under a single heading they can quickly be included in messages as a single item.

Sales Kits are created using the following process

Open Sales Kits window

Type name of the new Sales Kit in the text box

Select part to be added from the 'Available Documents' box

Click 'add'

Click 'close' when all required parts have been added, to complete the Sales Kit

Sales Kits can also be edited and deleted.

Adobe's Portable Document Format

Personalisation

Parts in PDF are a key aspect to the invention. PDF files are printable and so provide high-quality print options for the recipient and also for the client if hard copy forwarding of the message is deemed appropriate.

PDFs for Parts that are available for personalisation need to be assigned custom data fields. Custom data fields are assigned using a tag tool. The tag tool assigns an area in an open PDF by selecting the Tag Tool from the tool palette, drawing a box and tagging it to contain information from one of the custom data fields. A field is tagged by selecting from a pop-up of all available custom data fields. Fields are assigned using an html interface.

Annotation

Individual users annotate a PDF when they create an eMessage. They select the PDF for annotation. There will be an annotation tool icon. Users annotate a PDF by selecting the tool and clicking on the location they want the annotation to appear on the PDF. This opens a box where the user writes the annotation message. The user closes the box. Users can annotate multiple areas of a PDF.

When a contact receives the eMessages the annotation shows up on the PDF as a note icon. The text box with the annotation opens on roll over and closes on roll off.

Sending an eMessage

EMessages are sent using the following process:

There are 4 steps to sending an eMessage.

Step 1: To Select Recipient.

View list of contacts by individual, group or by company name. Choose an option from the drop down menu and click go.

Select the name of the recipient(s) from Found Contacts and click on the button with the plus sign to add to the Selected Contacts list.

To select more than one recipient, keep the Shift or the Control key depressed when selecting recipients.

Remove a contact that you have added in error to Selected Contacts, select the name and click remove.

Proceed to the next step.

Step 2: Attach Documents

Find a document in the VLR using the search keys.

Select the relevant search criteria, click on the go button to view a list of documents.

Select the document to attach from Found Documents, click on the button with the plus sign to add to the Selected Documents list.

Select more than one document - keep the Shift or the Control key depressed when selecting documents.

Remove a document added in error to Selected Documents - select the document and click remove.

Proceed to the next step.

Step 3: Annotate Documents and Add Teaser Text

You can annotate the attached document(s). The annotation will direct the recipient to a certain area within the attached document.

Click on the red button on the left hand side of the document title to write your annotation.

Click on the add annotation button and then click the area in the document where you would like to place the annotation. Write the annotation in the box provided. Close the annotation box and a page icon will appear. The recipient will be able to read the annotation by moving the mouse over the page icon in the document.

To move the icon within the document, use the mouse to drag and drop the page icon.

To delete annotation click on the annotation and hit the delete key on your keyboard.

You can also add teaser text to the attached document. This is a short text message which gives your recipient information regarding the attached document.

To add teaser text, enter your text in the text box provided.

Proceed to the next step.

Step 4: Compose Your Message

Enter the title of your message in the box provided.

Select an introduction from the drop down menus and text boxes provided.

Type the text of your message in the box provided.

Feedback Options: There are four text boxes underneath the message box to which you can add your feedback options.

You may choose to send the email as HTML or as plain text. The default option is set to HTML.

Proceed to the next step.

Step 5: Send Message

Review the contents of message prior to sending it. Click ok and then send message now to send the message.

Managing Messages

Messages are tracked and managed using the following procedures:

These tabs are found in the top right hand corner of the Workspace.

Message Summary Screen

Details all messaging activity

Inbox

Details all responses

Outbox

Details all eMessages sent.

The drop down menu in the top right hand corner filters messages by date.

Messages can be archived and retrieved for later use

Managing Contacts

Users must also manage their contact/recipient lists.

Contacts are managed in the Contact Manager.

New Contacts are added using the following process:

Click 'add' button on the 'Contacts Listing' screen

Fill in details in the 'New Contact' window

Click 'save' to add contact to list of contacts

New groups are added using the following process:

Click 'group' button on the 'Contacts Listing' screen

Click 'add' on the 'groups listing' screen

Fill in the relevant details.

Click 'save' to add to the list of groups

Contacts are added to groups using the following process:

Click contact name on the 'Contacts Listing' screen

Select the group you want to add the contact to from the 'add to group' drop down menu in the 'edit contact' window

Click 'save' to add the contact to the group

Contacts are uploaded using the following process:

A tab or comma delimited contact list can be uploaded to the MessageMaker contacts.

Click 'upload' on the 'Contacts Listing' screen

Select the file to upload using the browse button.

Select your option and click 'upload'

Map each detail to the relevant field, e.g. a contacts' last name is linked to the last name field.

Edit contact details using the following process:

Click 'contacts' on the toolbar.

Click the edit button on the right hand side of contact name

Edit the contact details as required

Click 'save' to save your changes

Users can send one message to multiple contacts or to a group of contacts. They can personalise the text message and the email. Users can define the message greeting and signature for both the text message and the email by selecting from pre-defined options.

Feedback Options

An important feature is the ability of the user to:

Define feedback mechanisms on the fly to suit a particular campaign or price break offer

Send messages to the contact of users associated with their client account without actually gaining access to full details pertaining to those contacts.

For example: Marketing managers may need to track regional responses as well as price breaks, but they would not have access to the contact name and company details. Thus, the response monitoring module 35 provide comprehensive feedback data to the user indicating effectiveness of the campaign.

The invention enables both the sender and the recipient to track all messaging and response activity using an electronic network such as the Internet. The invention also allows the distribution of mass personalised context sensitive messages using a direct mail model enabling the recipient to respond using the Internet. Another feature is use of a combination of traditional printed direct mail pieces and an electronic medium to create qualified sales leads and improve sales effectiveness.

The invention is not limited to the embodiments described but may be varied in construction and detail.

Claims

1. A messaging system comprising:-

build means for automatically building messages, each of which has profiled content customised for a recipient contact:

mail means for transmitting the messages to the contacts; and

response management means for managing responses from contacts.

2. A messaging system as claimed in claim 1, wherein the system comprises a client manager for maintaining a database of valid system clients, and a contacts database of contacts grouped according to client.

3. A messaging system as claimed in claim 2, wherein the system comprises a contacts manager for maintaining the contacts database and for allowing valid clients to update their associated group of contacts.

4. A messaging system as claimed in any preceding claim, wherein the system comprises a content manager for maintaining a content database of content elements associated with contacts, and for delivering the profiled content to the build means.

5. A messaging system as claimed in claim 2 to 4, wherein the client manager comprises means for maintaining a database of client-specific content such as logos or branding graphics.

6. A messaging system as claimed in any preceding claim, wherein the build means comprises means for building a message comprising a portion

transmitted to a contact and a portion maintained on the system, and the transmitted portion includes links to the hosted portion.

7. A messaging system as claimed in claim 6, wherein said links are HTML links.

8. A messaging system as claimed in claim 6 or 7, wherein the response management means comprises means for managing interactive retrieval of message content by the contacts via said links.

9. A messaging system as claimed in any preceding claim, wherein the system comprises a response monitoring means comprising means for monitoring the number and nature of responses.

10. A messaging system as claimed in claim 9, wherein the response monitoring means comprises means for monitoring:-

the number of messages not responded to,

the number of messages responded to, but for which the message content was not retrieved, and

the number of messages responded to and for which the message content was used.

11. A messaging system as claimed in claim 9 or 10, wherein the response monitoring means comprises means for monitoring responses on a per-client basis.

12. A messaging system as claimed in any preceding claim, wherein the build means comprises means for building a message comprising a html link to a collaboration space where the recipient and the sender can both exchange files, assign tasks and view all previous messaging history.

13. A messaging system as claimed in any preceding claim, wherein the build means comprises means for building and sending bulk personalised eMessages to a database of recipients and tracking and reporting on the results.

14. A messaging system as claimed in any preceding claim wherein the build means comprises means for integration with and reporting on lead generation programs to generate qualified sales leads.

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ABSTRACT

"A messaging system"

A messaging system (1) has a build engine (20) which builds targeted messages for contacts. The messages have profiled content retrieved from a content manager (5), and targeted contacts are retrieved from a contacts manager (10). A messaging engine (25) transmits the messages, and a response management module (30) manages responses. The responses are monitored by a monitoring module (35).

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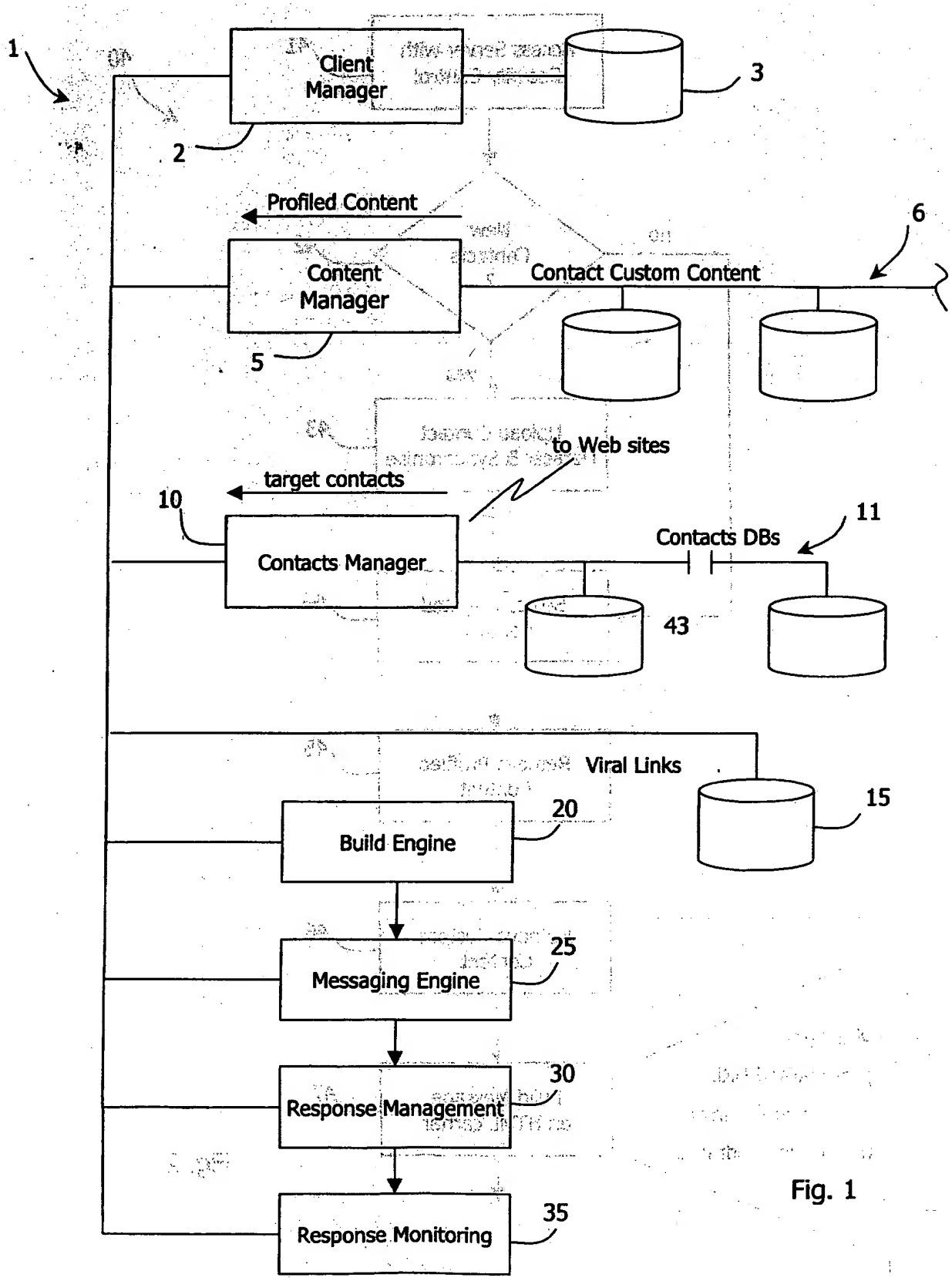
1
Client Manager
2
3
Profiled Content
Content Manager
5
6
Contact Custom Content
to Web sites
target contacts
10
Contacts Manager
11
Contacts DBs
43
Viral Links
15
20
Build Engine
25
Messaging Engine
30
Response Management
35
Response Monitoring

Fig. 1

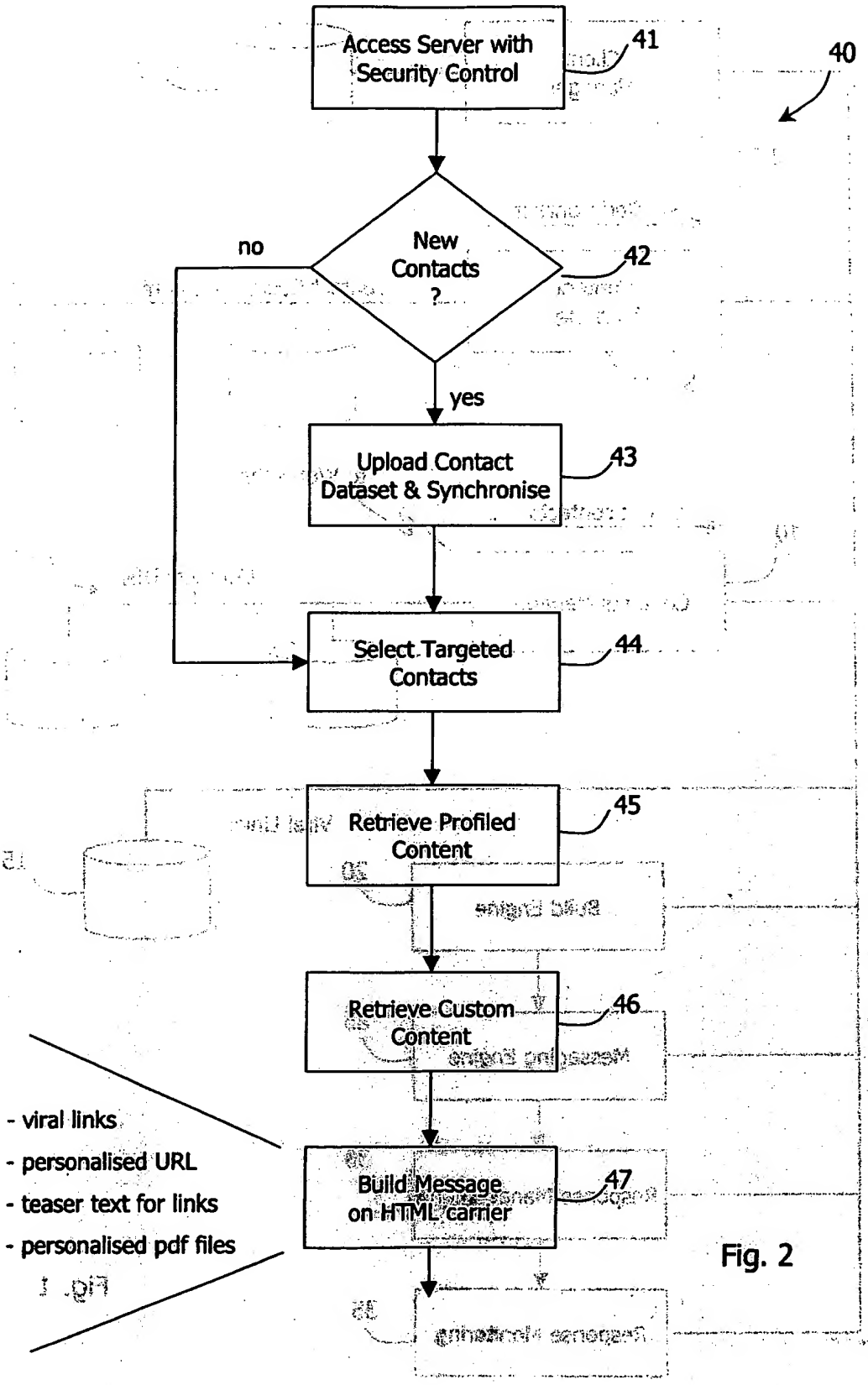
Access Server with Security Control
41
40
New Contacts ?
42
no
yes
Upload Contact Dataset & Synchronise
43
Select Targeted Contacts
44
Retrieve Profiled Content
45
Retrieve Custom Content
46
Build Message on HTML carrier
47
- viral links
- personalised URL
- teaser text for links
- personalised pdf files

Fig. 2

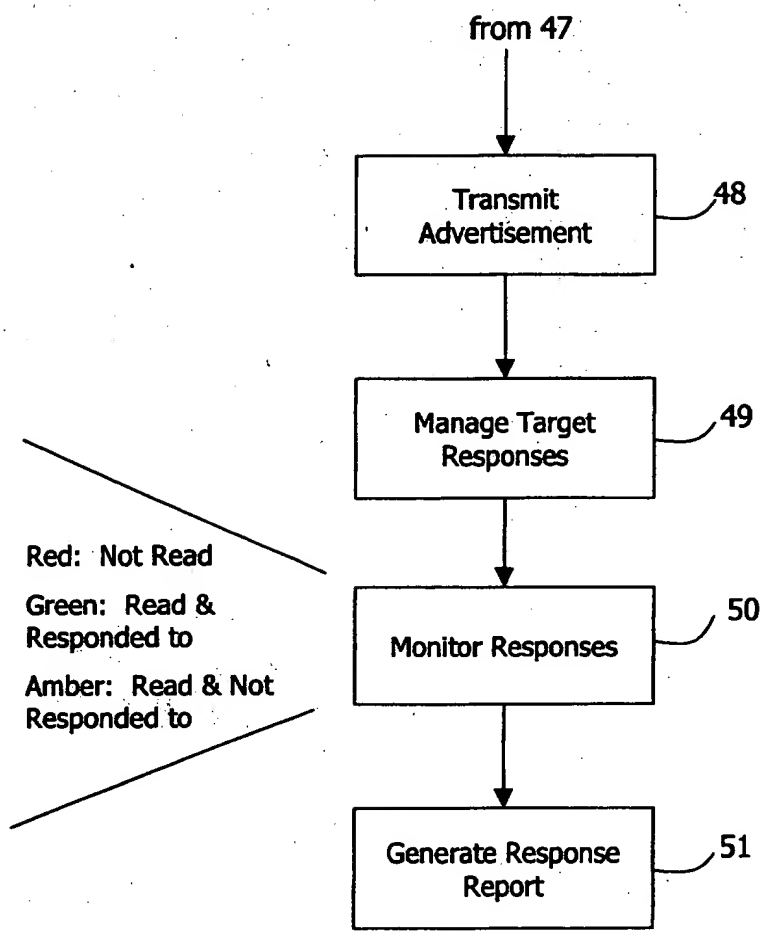

Fig. 3

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